Polaris ILS Hosted Offline Procedure

Last Updated: 10/21/2015

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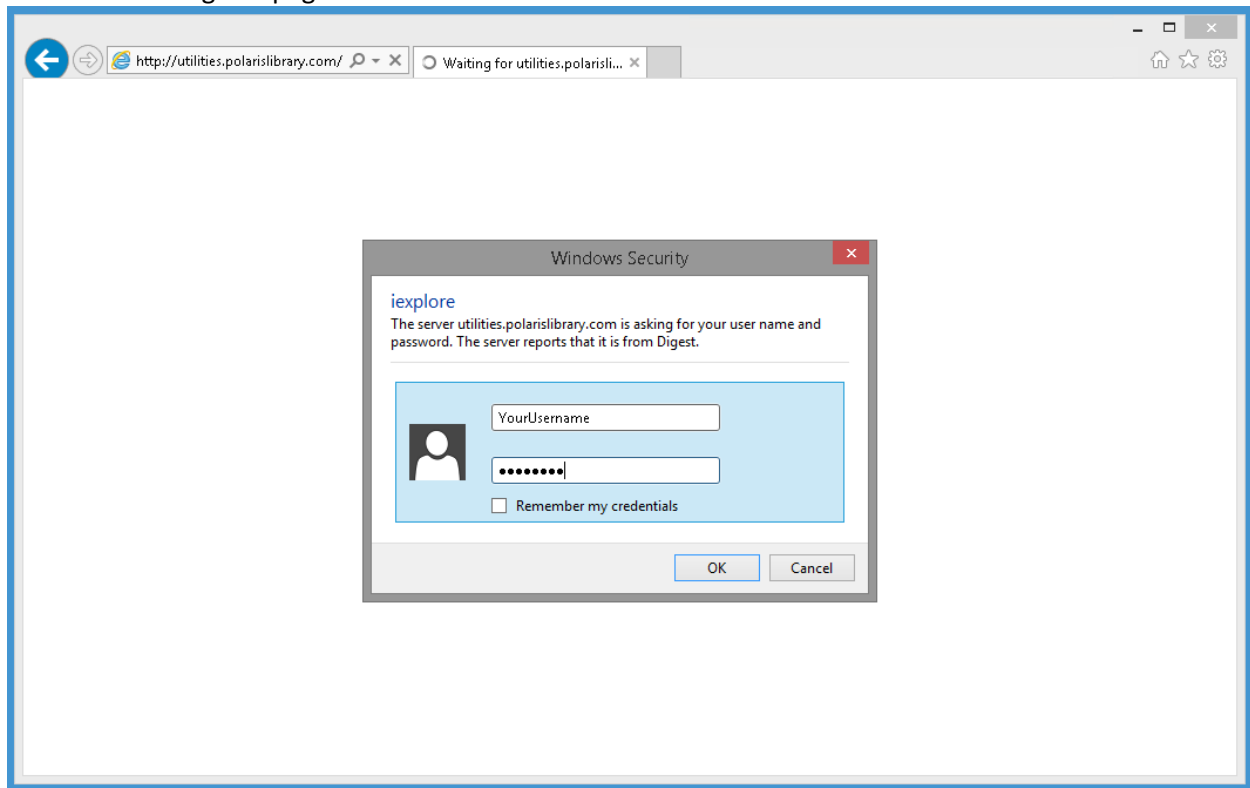
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Download Your Current Offline Client Installer

Download Your Current Offline Client Installer
NOTE: If you already have your current offline client installed, then you can skip this section.

1) Open a web browser on your local workstation and navigate to the Polaris ILS Hosted Offline Utilities Page:
   http://utilities.polarislibrary.com/

2) You will be prompted for your hosted credentials.
   - If your hosted usernames are using the "HPL" domain then you will be able to log into the page using:
     - Your terminal server user credentials (used for remote desktop)
     - Your application user credentials (used for staff client and/or Leap)
   - If your hosted usernames are NOT using the "HPL" domain, then you will have a dedicated login for accessing this page.

Download Your Current Offline Client Installer

3) After successfully logging into the Polaris ILS Hosted Offline Utilities Page you will see a listing of any active Polaris ILS clients, any related installer files, and important links to various sources (e.g. Microsoft).
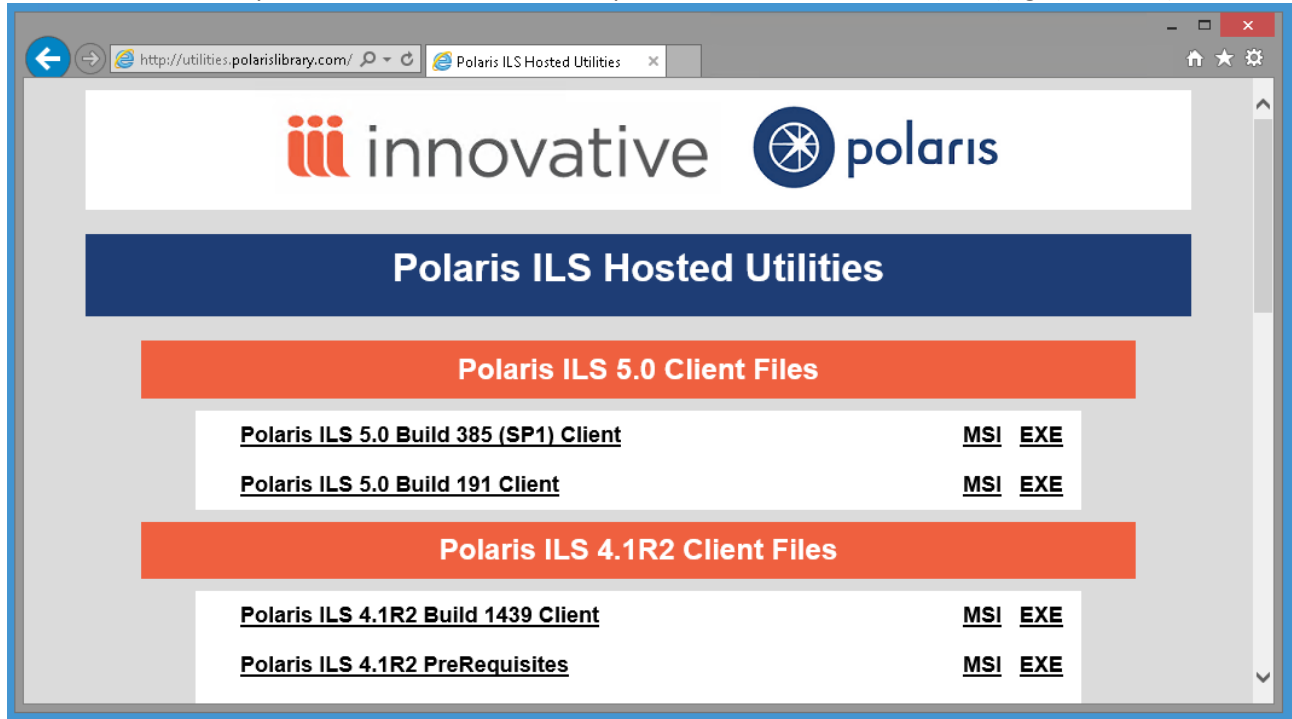
4) Click on the Polaris ILS client version that you need and the download should start automatically.
Make sure you download the installer someplace where you will be able to find it after the download finishes.

NOTE: Most libraries will be fine using the .EXE version of the installer, but since some libraries prefer to use the .MSI package to deploy to their workstations we have made that version available as well.
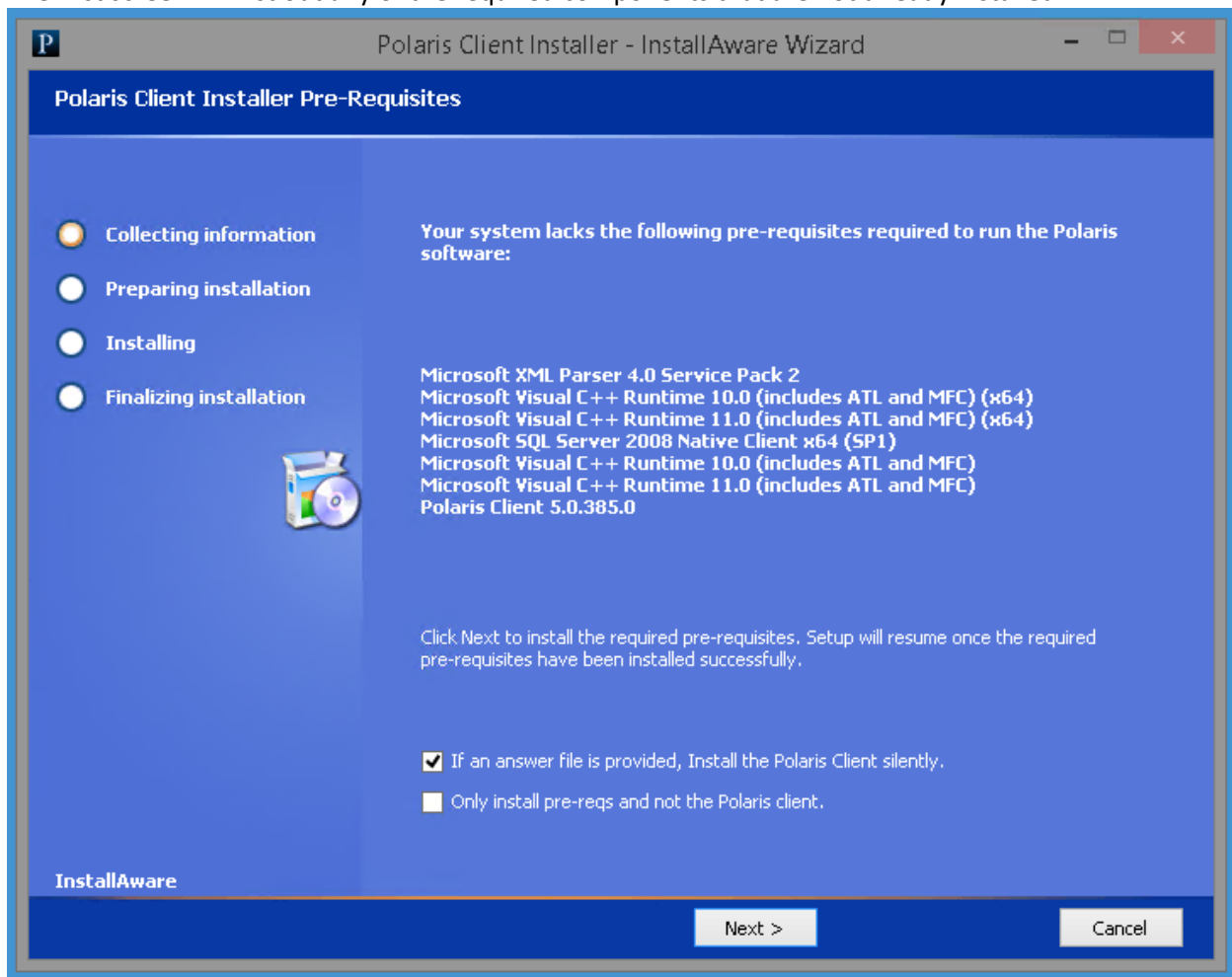
Installing the Polaris ILS Offline Client

After downloading the Polaris ILS Offline Client installer (previous section) you need to install it on each circulation workstation that will be working in offline mode.

1) Launch the installer that you downloaded in the last section.
   The first screen will list out any of the required components that are not already installed:

Click "Next" to continue through the pre-requisite installation and onto the client installer.
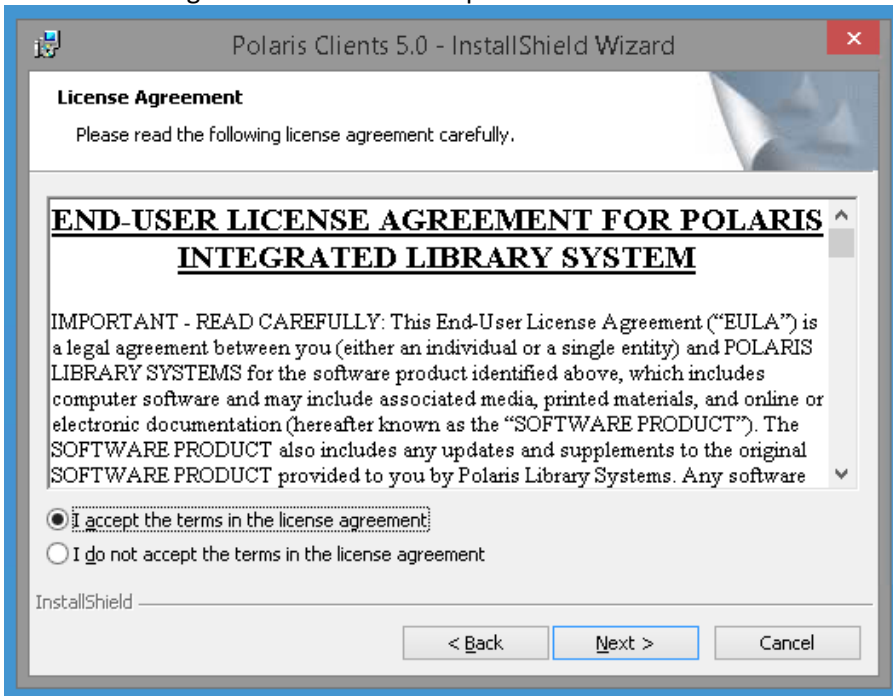
Installing the Polaris ILS Offline Client

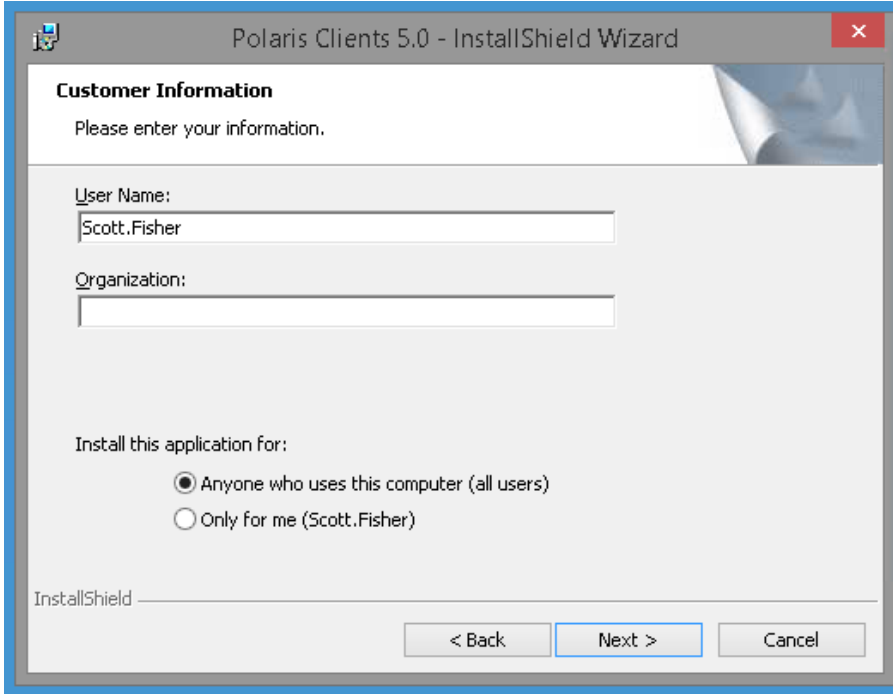2) After the pre-requisite installation is completed the client installer window will open:
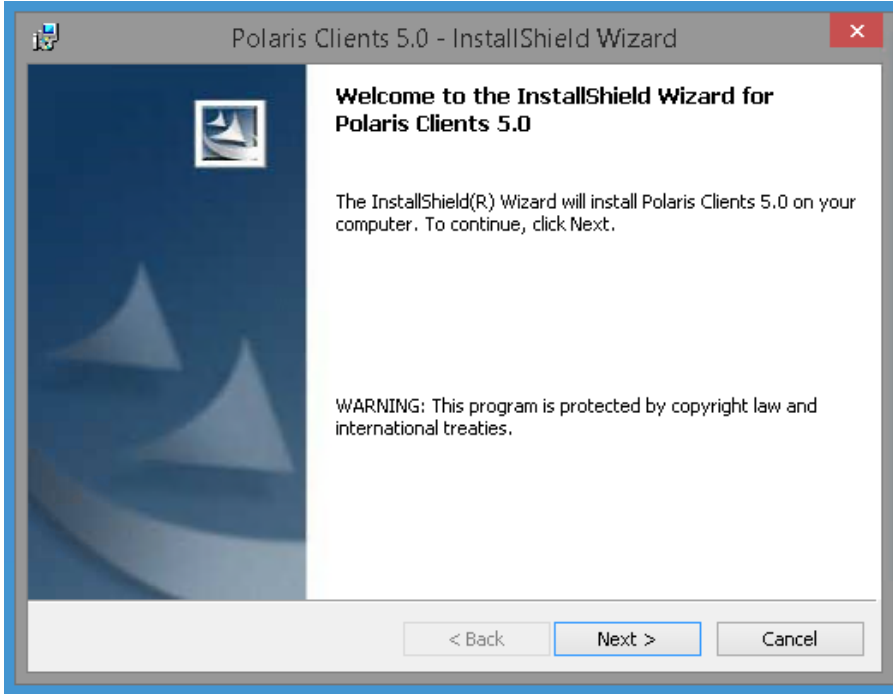
Click "Next" to continue through the installation process.

3) At the license agreement select "I accept the terms …" and then click the "Next" button to continue.

4) The user page should be automatically filled in. Click the "Next" button to continue.

NOTE: It is a good idea to install the client for "Anyone who uses this computer (all users)."

5) At the feature selection page just click the "Next" button to continue (the default setup is all you need).

Installing the Polaris ILS Offline Client

6) If you use a specific folder to save your offline transactions, then update this field to the proper path. If you do not use a custom storage path for offline transactions, then the default path is fine. Click "Next" to continue.

7) On the "Server Information" page you need to enter "OFFLINE" into the "Application Server Name" field:

After entering the application server name click "Next" to continue.

8) You have now completed the setup configuration and are ready to install the offline client.
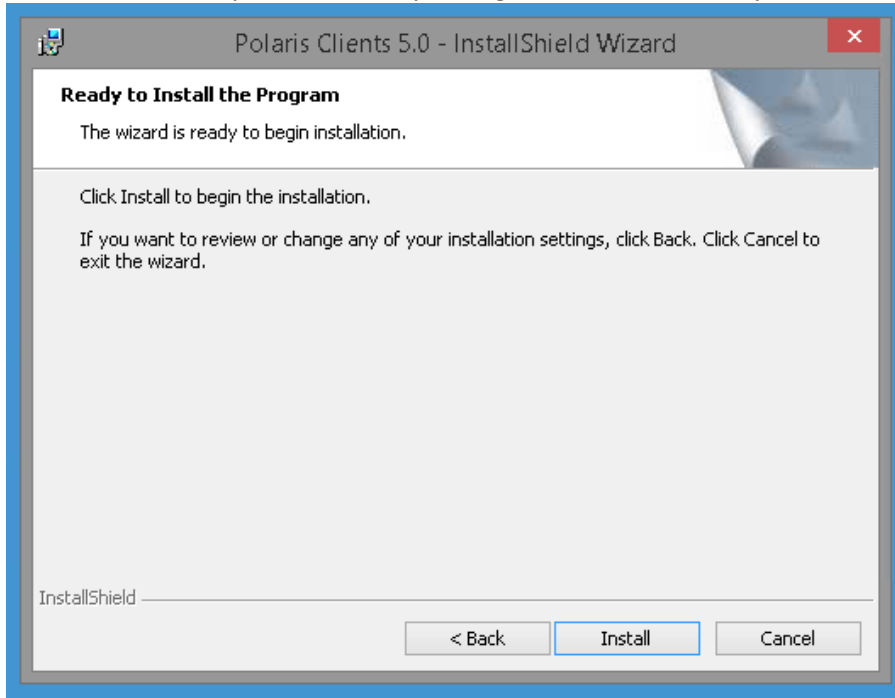
Click "Install" to start the installation of your offline client.
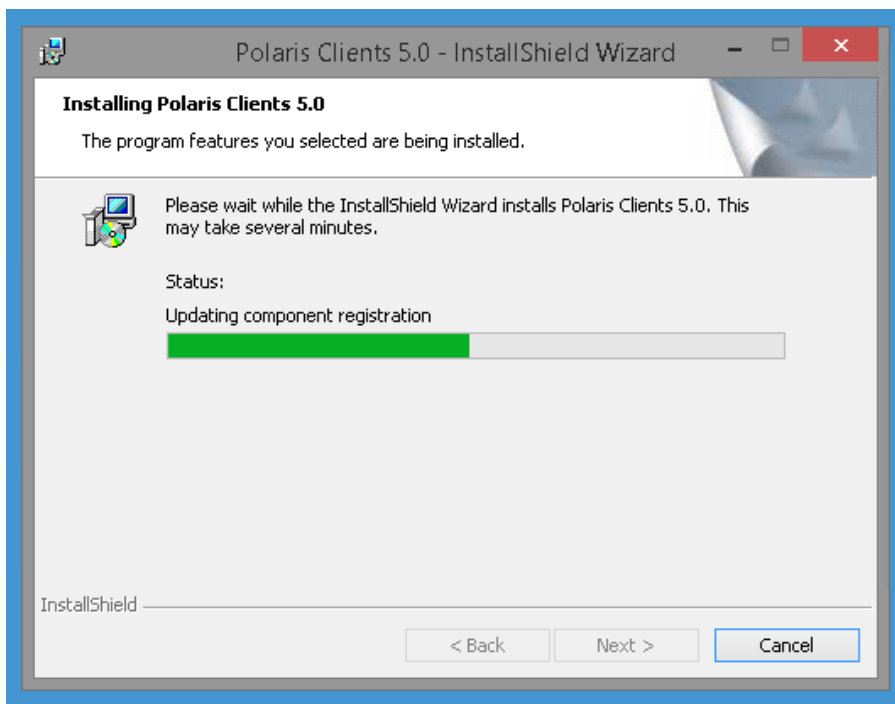
9) When the installation finishes click the "Finish" button to close the installer window.
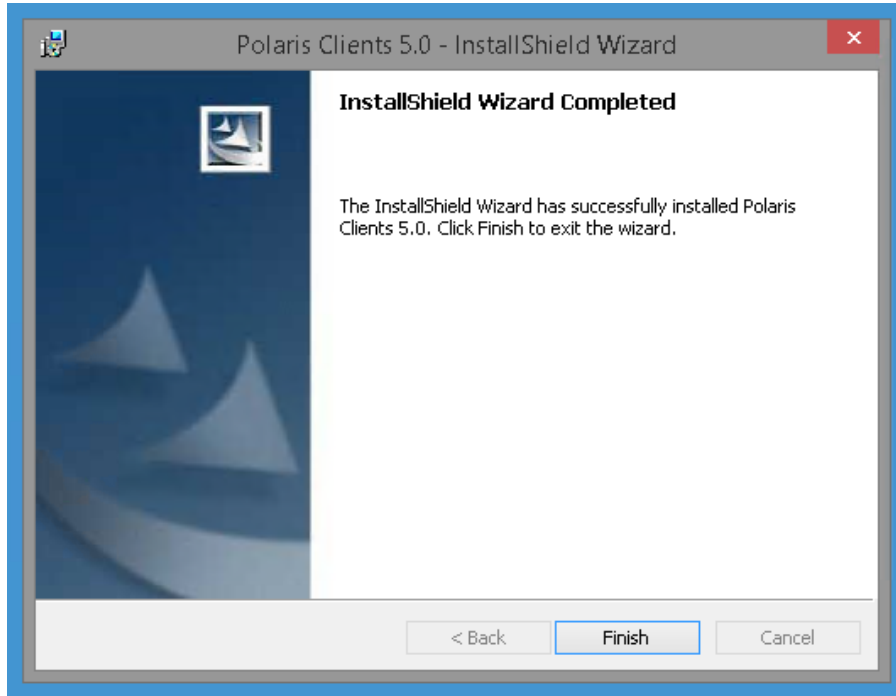
Downloading Your Library's Offline Databases

Downloading Your Library's Offline Databases

NOTE: By default your offline databases are updated daily at 6:00 AM local time.

1) Open a web browser on your local workstation and navigate to your Polaris ILS Hosted Offline Databases Page: Every library has a unique web page that consists of their PAC URL followed by "/offline/"

   EXAMPLE: A library with PAC URL http://example.polarislibrary.com/ would get their offline databases from http://example.polarislibrary.com/offline/

2) You will be prompted for your hosted credentials. You will be able to log into the page using:
   - Your terminal server user credentials (used for remote desktop)
   - Your application user credentials (used for staff client and/or Leap)
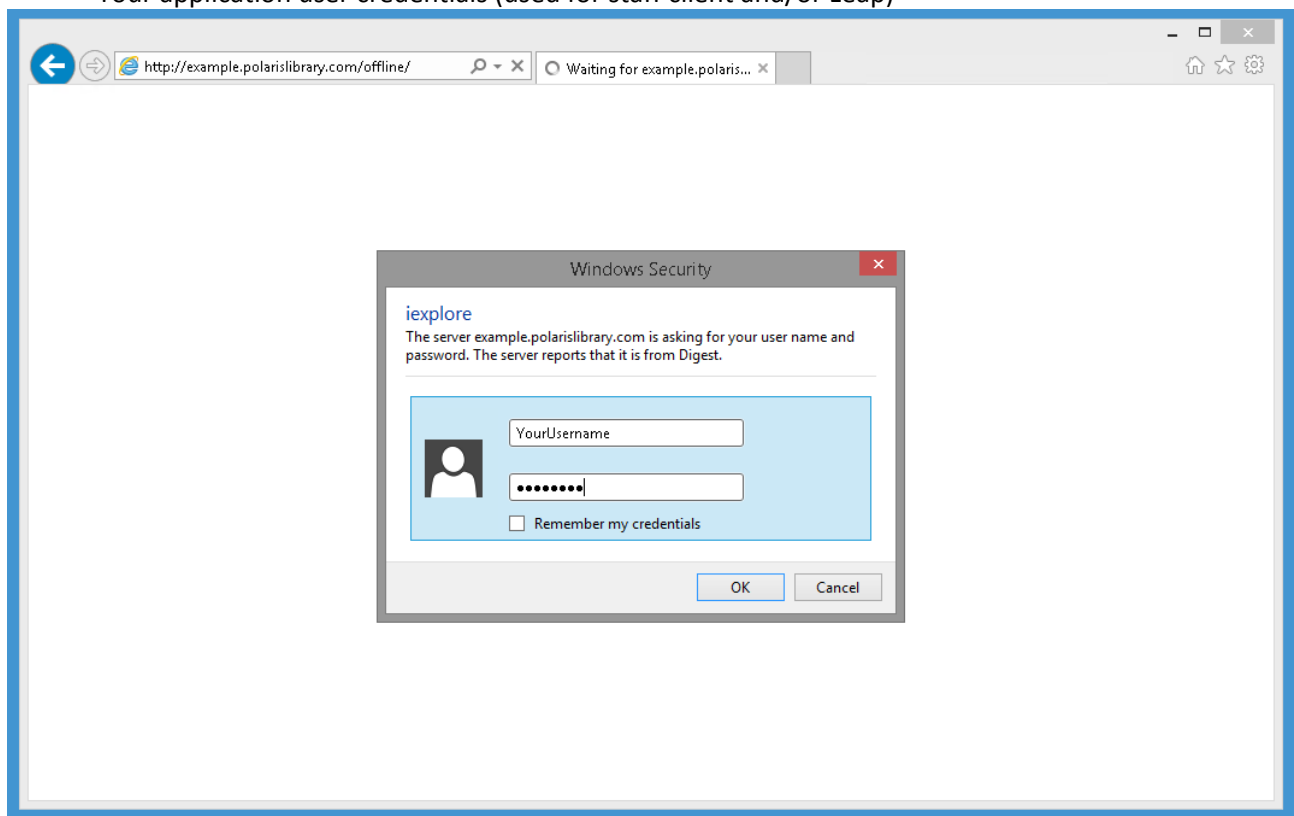
Downloading Your Library's Offline Databases
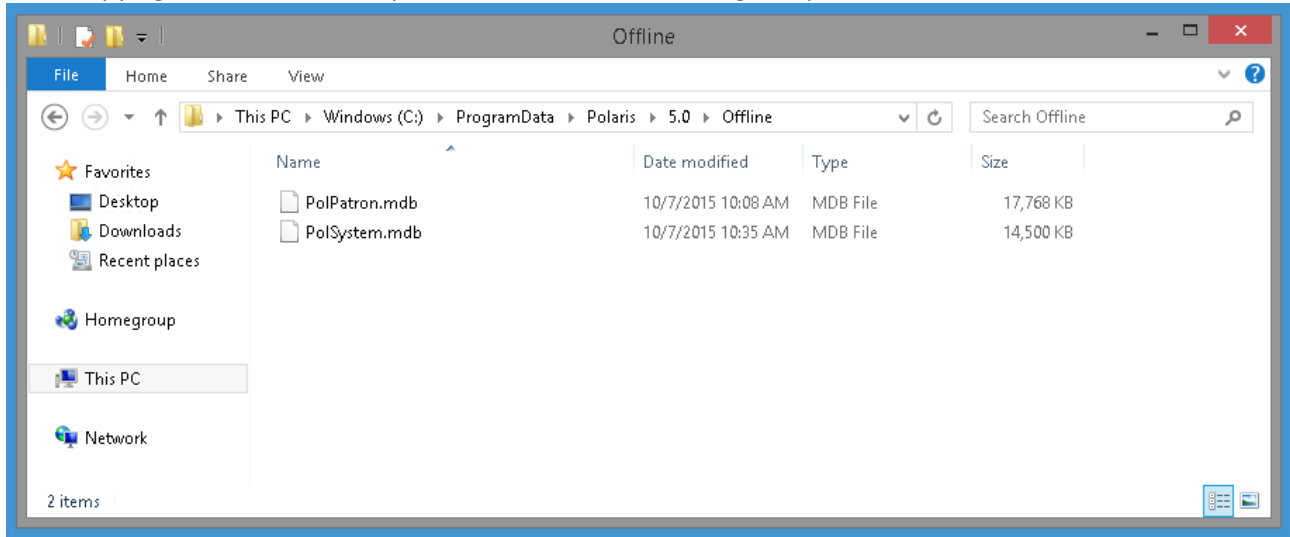
3) After successfully logging into the Polaris ILS Hosted Offline Databases Page you will see a listing of the databases needed for offline processing:
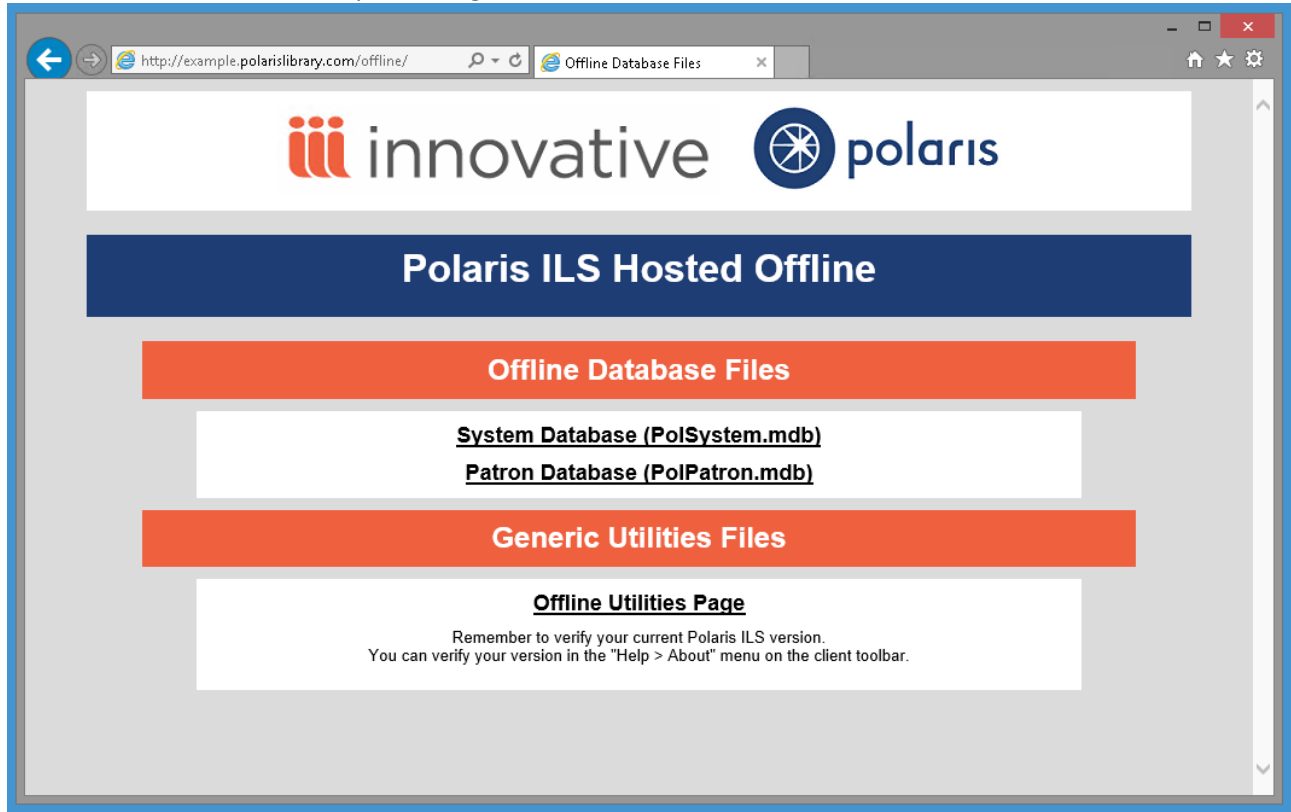
4) Download a copy of each of the Offline Database files (including both "PolSystem.mdb" and "PolPatron.mdb"). REMINDER: These files are updated every morning at 6:00 AM (default) so you should plan to update these on a regular basis to ensure that you are prepared for any unexpected outages.

5) Copy the downloaded database files (from the last step) to the Offline folder that is created during the install. The Offline folder is located here: C:\ProgramData\Polaris\<version>\Offline\ EXAMPLE: For Polaris ILS 5.0 the full path would be C:\ProgramData\Polaris\5.0\Offline\

Downloading Your Library's Offline Databases

6) After copying the database files you should have the following setup:

	Offline			— □ ✕
File Home Share View				⌄ ❓

This PC ▸ Windows (C:) ▸ ProgramData ▸ Polaris ▸ 5.0 ▸ Offline   Search Offline

Name	Date modified	Type	Size
PolPatron.mdb	10/7/2015 10:08 AM	MDB File	17,768 KB
PolSystem.mdb	10/7/2015 10:35 AM	MDB File	14,500 KB

⭐ Favorites
🖥 Desktop
📥 Downloads
🗒 Recent places

🏠 Homegroup

💻 This PC

🖧 Network

2 items

IMPORTANT: The above screenshot shows the proper directory for Polaris ILS 5.0 installs. Make sure you have the proper version number to match your current offline client version.

You have now successfully downloaded your Polaris ILS Hosted Offline Database files!
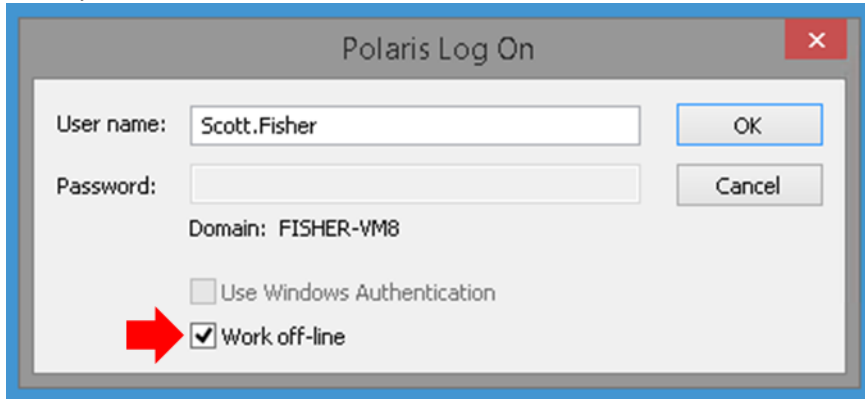
Using the Polaris ILS Offline Client

ASSUMPTION: The steps described in the sections titled "Installing the Polaris ILS Offline Client" and "Downloading Your Library's Offline Databases" have already been completed.

1) Open the Polaris ILS shortcut from your workstation's desktop:

2) Enter your staff member record username and select the "Work off-line" checkbox:

   Are you getting an error when trying to log in and work offline?
   Try the various fixes described in the troubleshooting section. Click [here](#) to go there now.
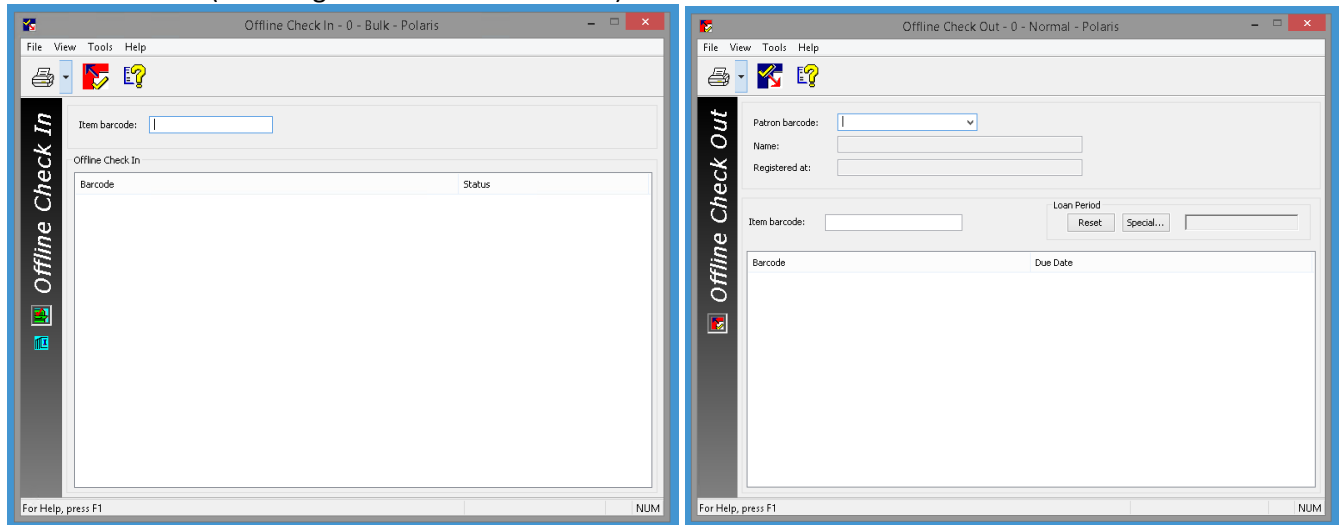
3) Proceed with your offline processing as normal.
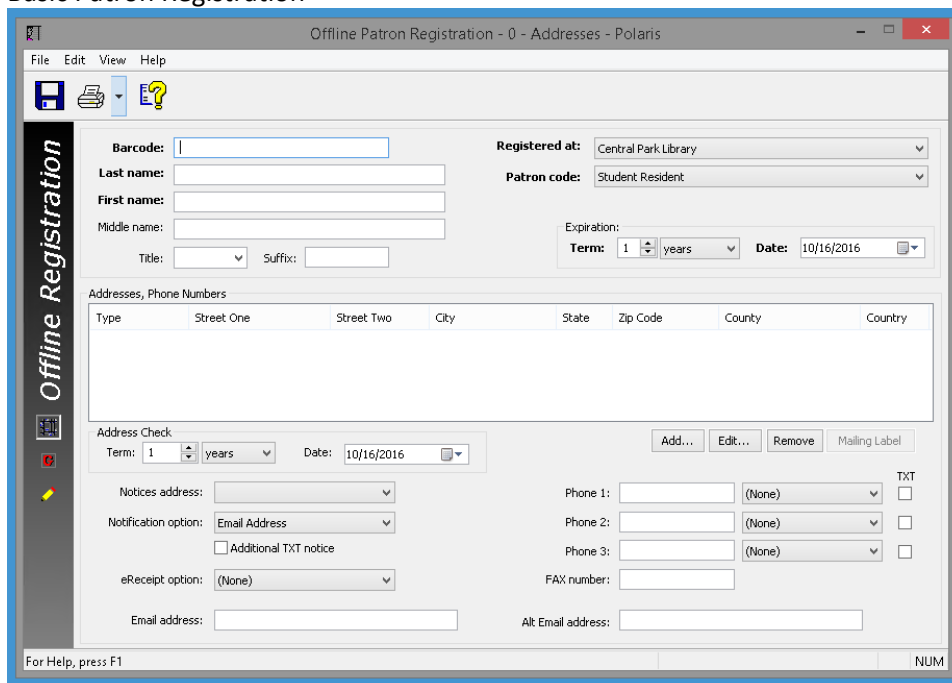
What Actions Can Be Performed While Working Offline?

During Offline mode you will be able to perform the following actions:
- Basic Circulation (including Check In and Check Out)

- Basic Patron Registration

Uploading the Offline Transactions

Uploading the Offline Transactions

1) Log into your live database client (from your hosted terminal server).

2) On the client toolbar open up the Circulation drop-down menu and select "Bookmobile" from the list:
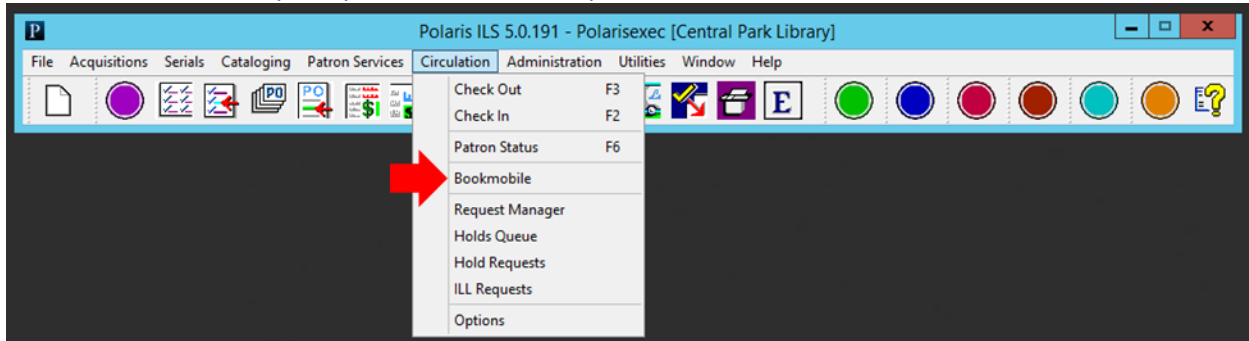
3) Open the "Tools" drop-down menu and select "Options…" from the list:
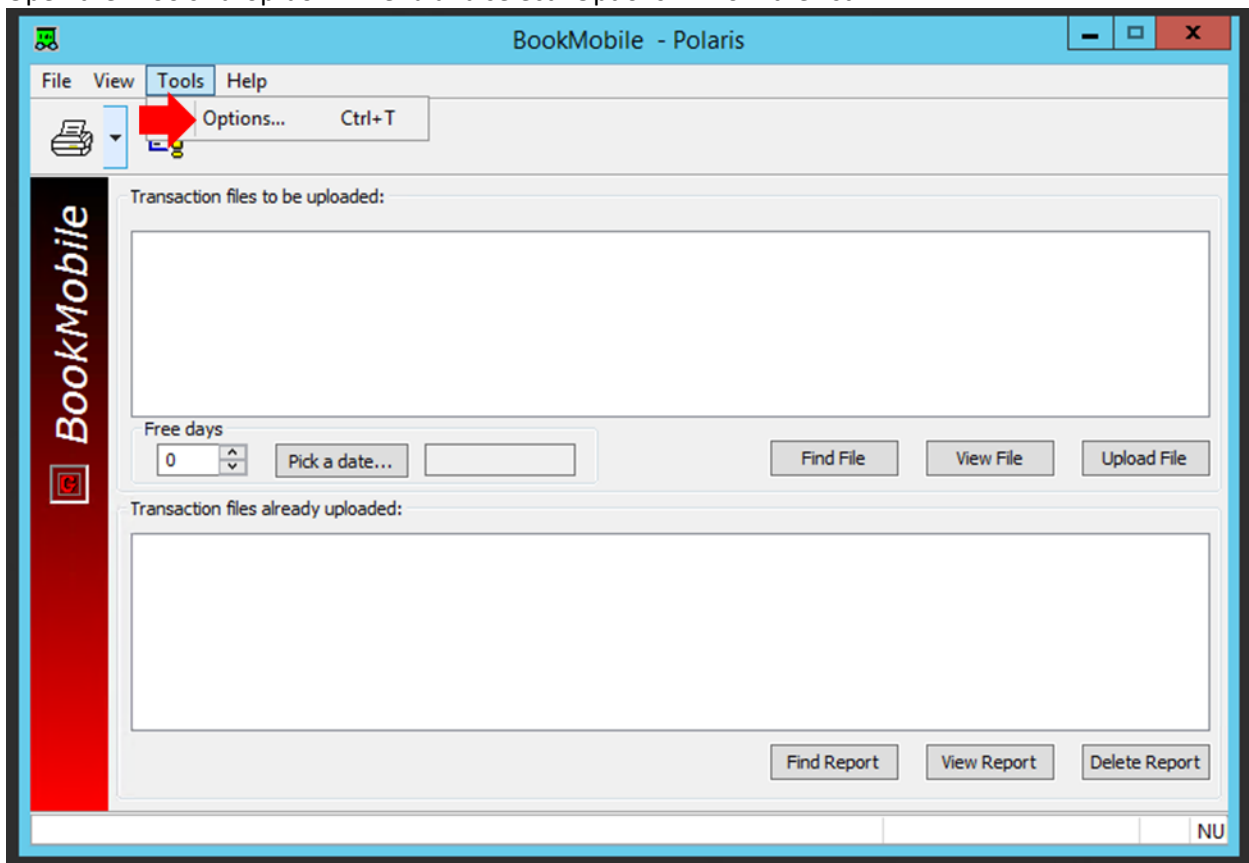
4) Select "All offline transaction/log files" from this menu and then click the "OK" button:
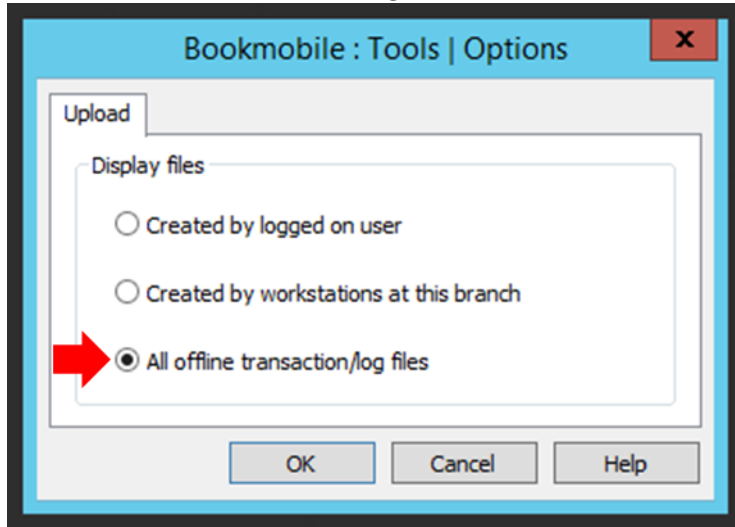
IMPORTANT: This is essential for hosted libraries as their local workstation user will rarely ever be the same as the username that they are using to log into the hosted terminal server.

5) Click the "Find File" button to launch an Explorer window:
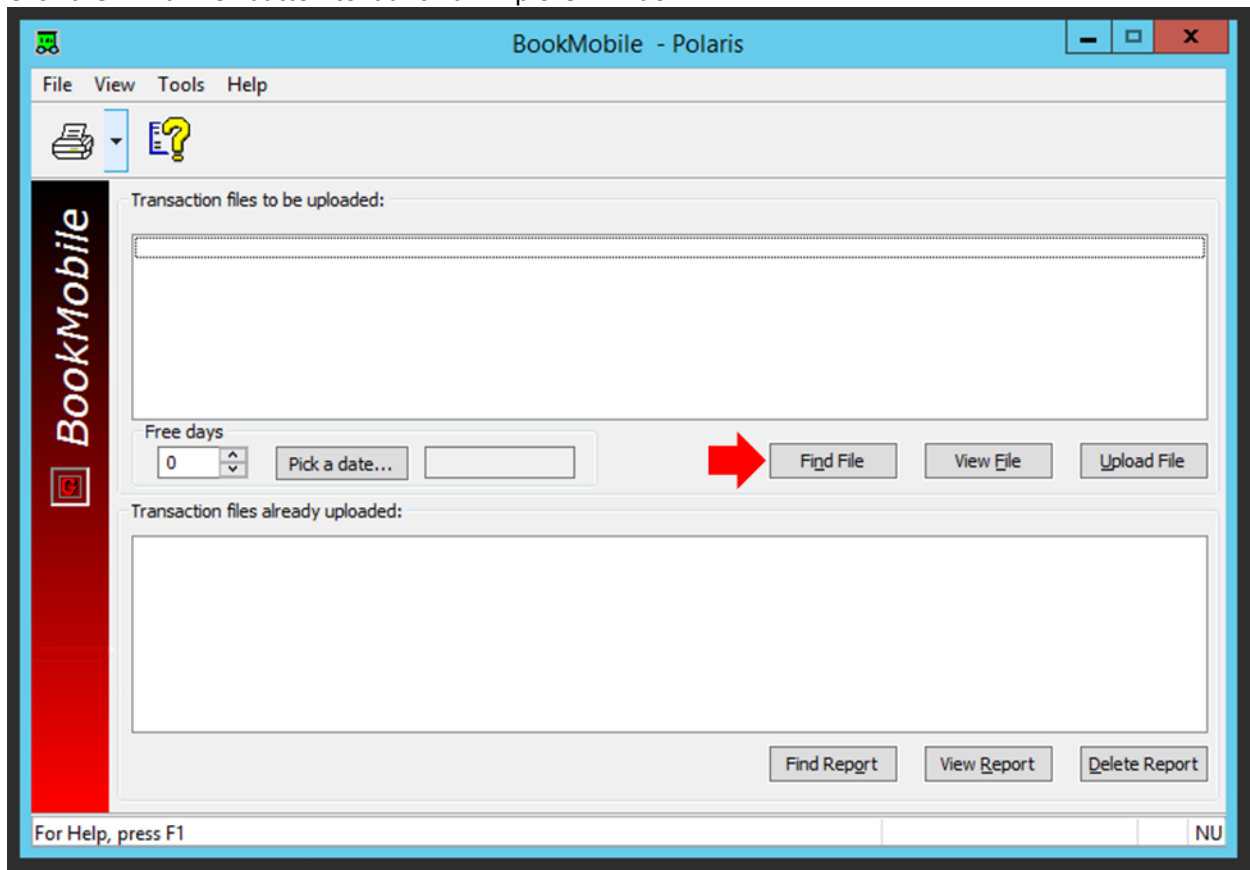
Uploading the Offline Transactions

6) Navigate to your mapped drive and then to the file directory where your offline transactions are saved:
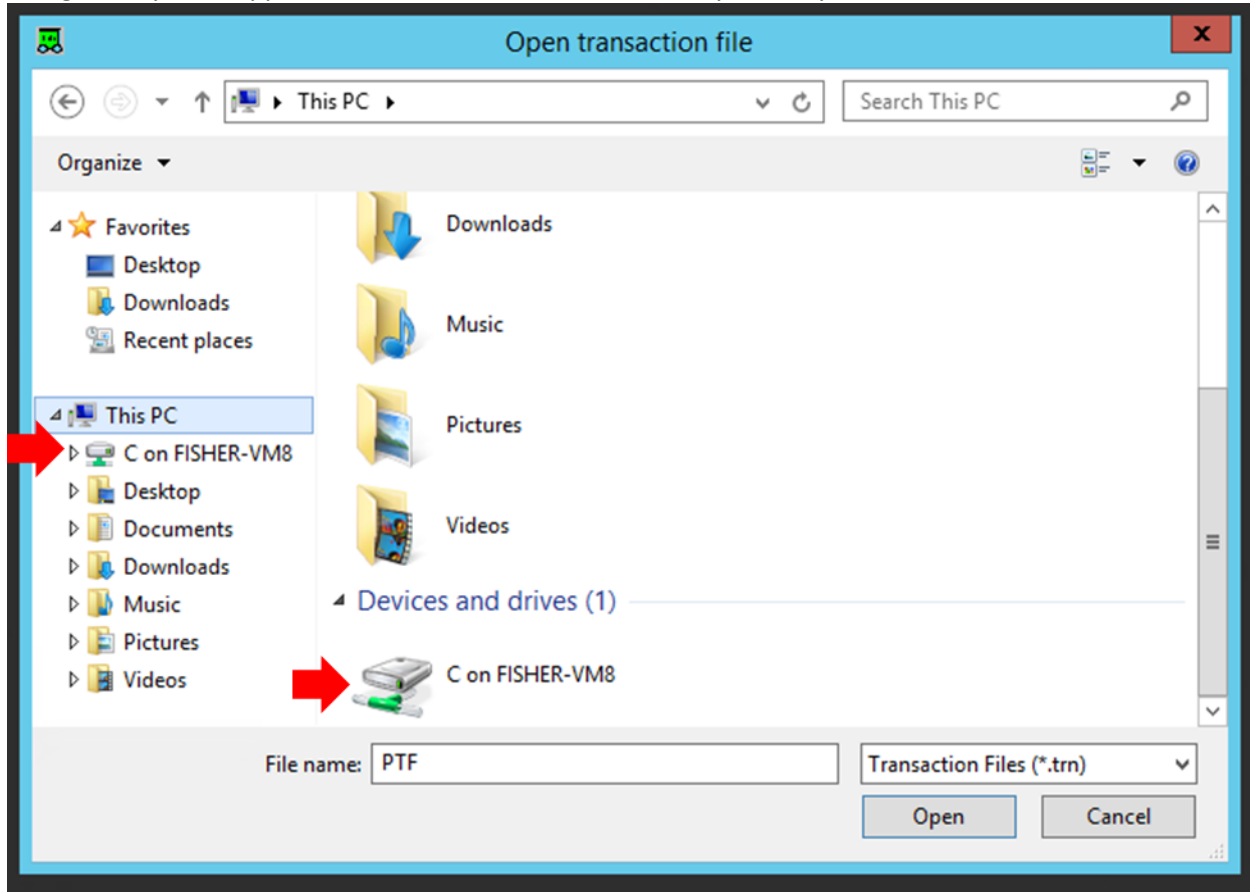
NOTE: In the above screenshot the mapped drive is "C on FISHER-VM8" where "FISHER-VM8" is the name of the workstation.

Not seeing your mapped drives? Click here for the troubleshooting section for this issue.

Not able to locate/open the ProgramData folder? Click here for the troubleshooting section for this issue.

Uploading the Offline Transactions

7) Highlight the files that you would like to upload and click the "Open" button to add them to your queue:
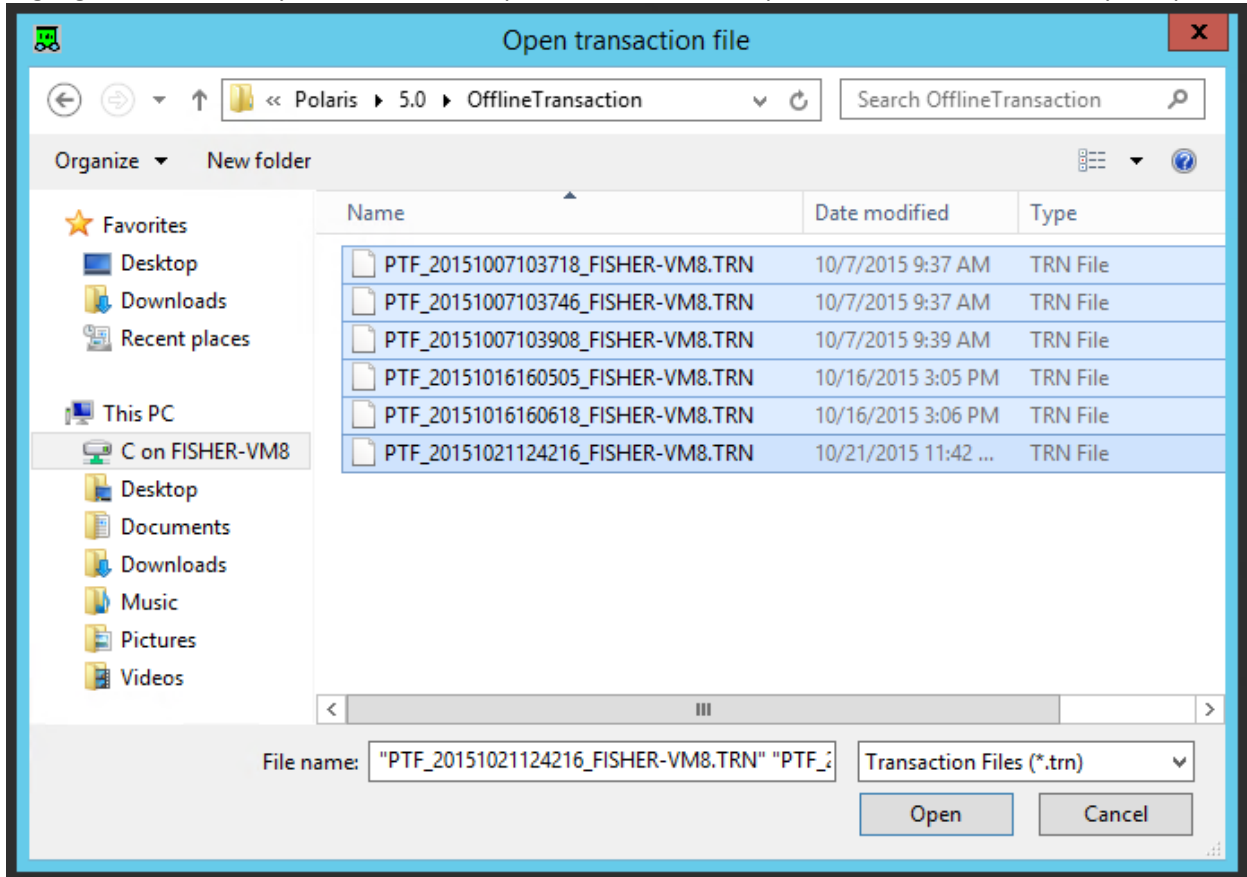
NOTE: By default the file path would be C:\ProgramData\Polaris\<Version>\OfflineTransactions however this could be changed during the installation of the offline client.

8) Now that the files are in the upload queue click a file in the list and then click the "Upload File" button:
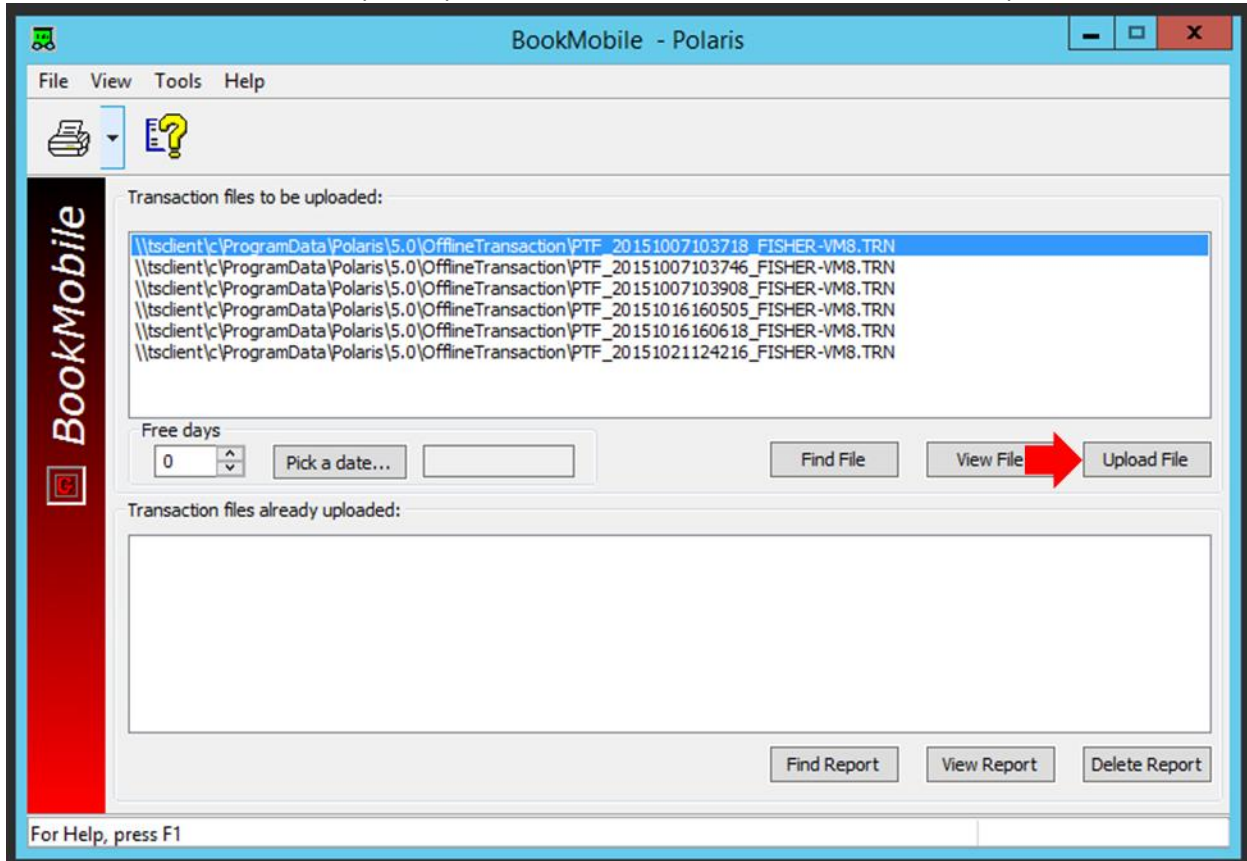
==IMPORTANT: The best practice is to upload any offline transactions from oldest to newest (the time stamp is in the filename of each TRN file).==
HINT: You can select several of the files in the queue at once by using the SHIFT key and selecting the first and last file in the succession.

9) After clicking the "Upload File" button you will need to acknowledge that you would like the process to continue whenever an error is encountered:
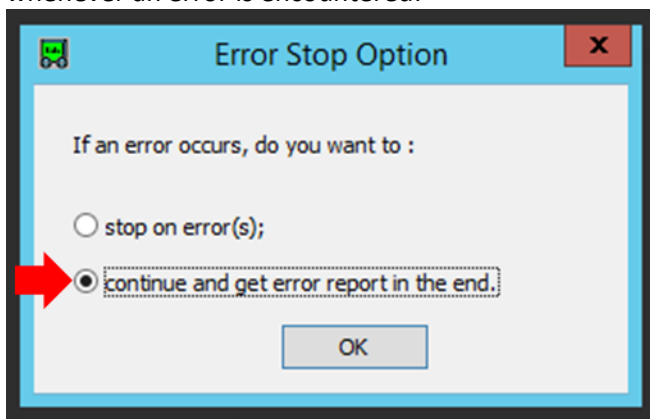
Uploading the Offline Transactions

10) After the process completes you will see that a log file is created in the bottom section:
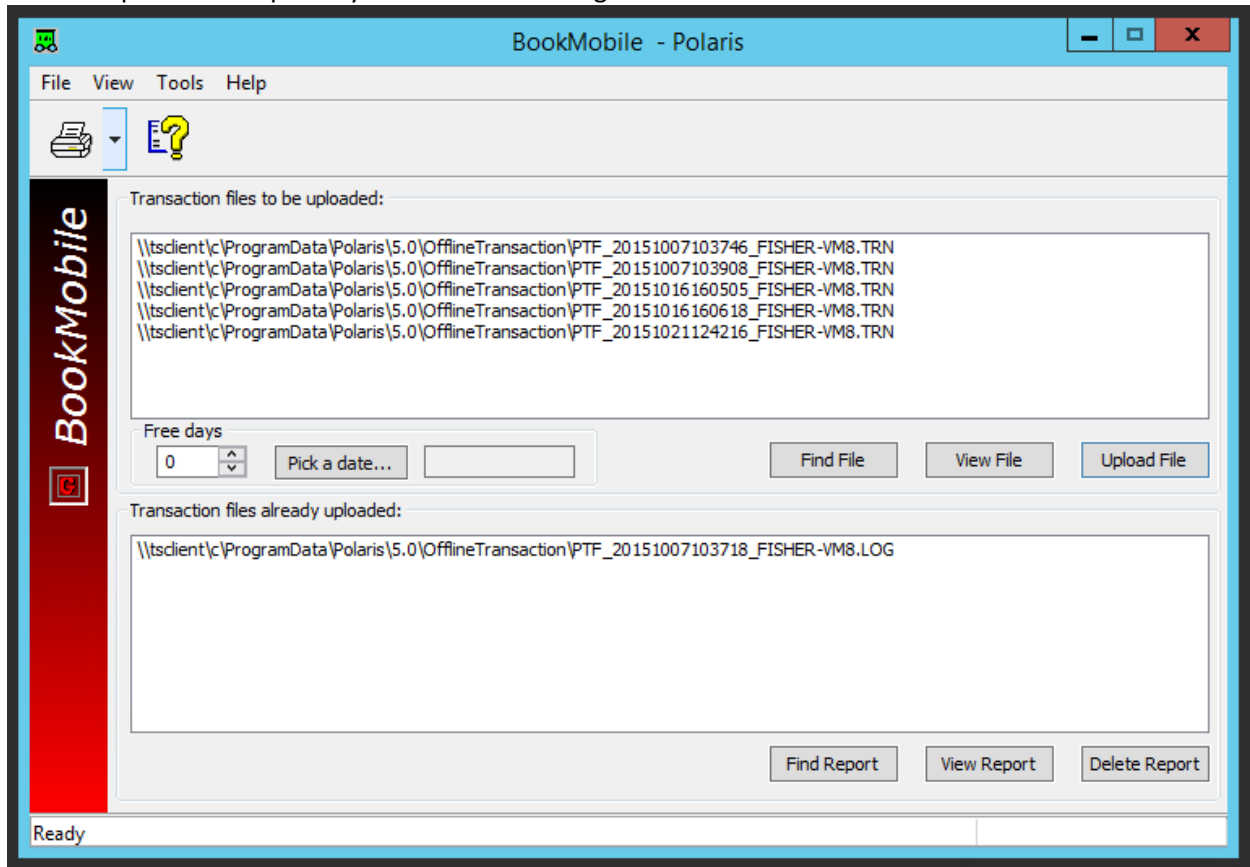
HINT: You can click on the LOG file in the list and then click the "View Report" button to see what errors and/or warnings were discovered during the offline upload process.

11) Repeat for each additional file that you want to upload.

Once all files have been processed then you will have successfully uploaded your offline transactions.

Common Errors Seen During the Offline Process
I can't find/see the "ProgramData" folder

Cause of Error:
Your ProgramData folder is likely hidden.

Steps to Resolve this Error:
1) Open the Windows Explorer program (formerly "My Computer") and open up your local hard drive. Click the "View" button at the top to display the View toolbar:
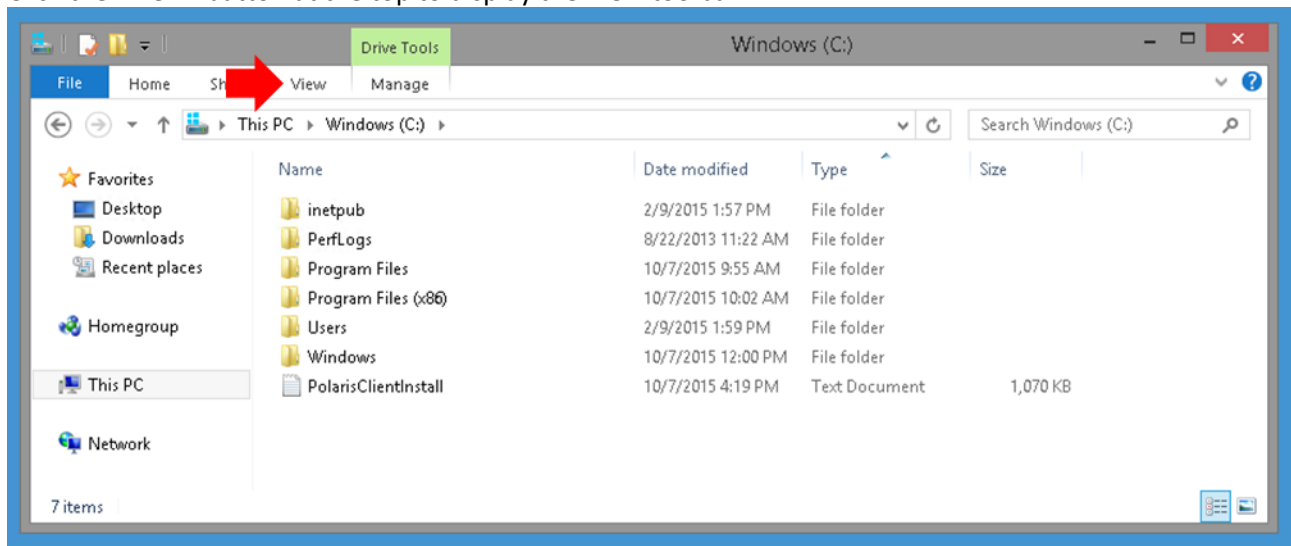
2) In the "Show/hide" section of the View toolbar check the box for "Hidden items" to display the hidden folder:
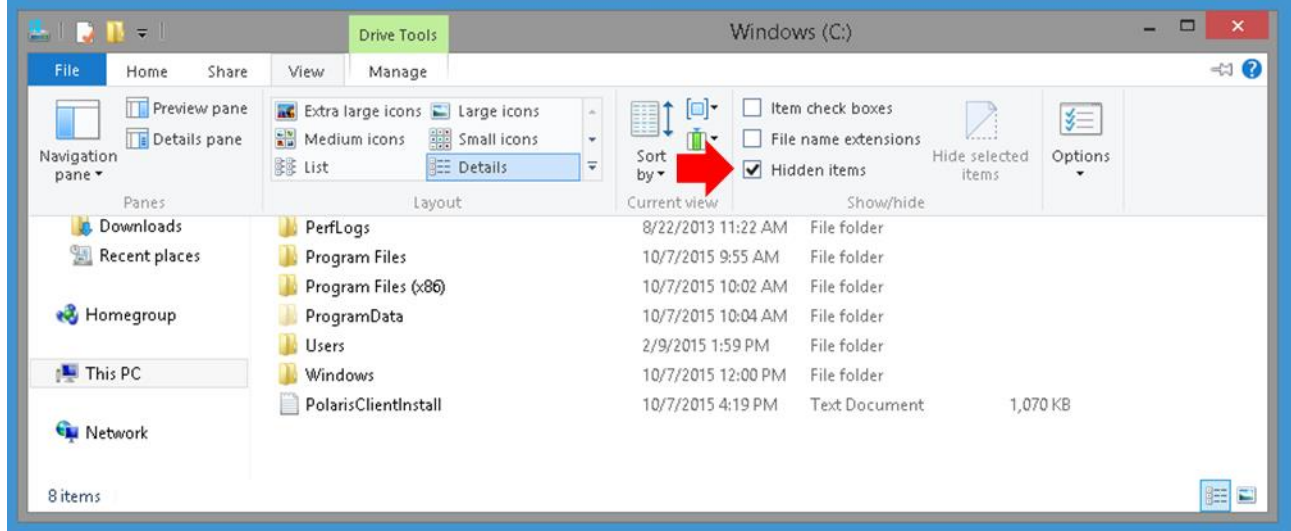
3) Right click on the newly visible "ProgramData" folder and click "Properties" from the drop down menu:
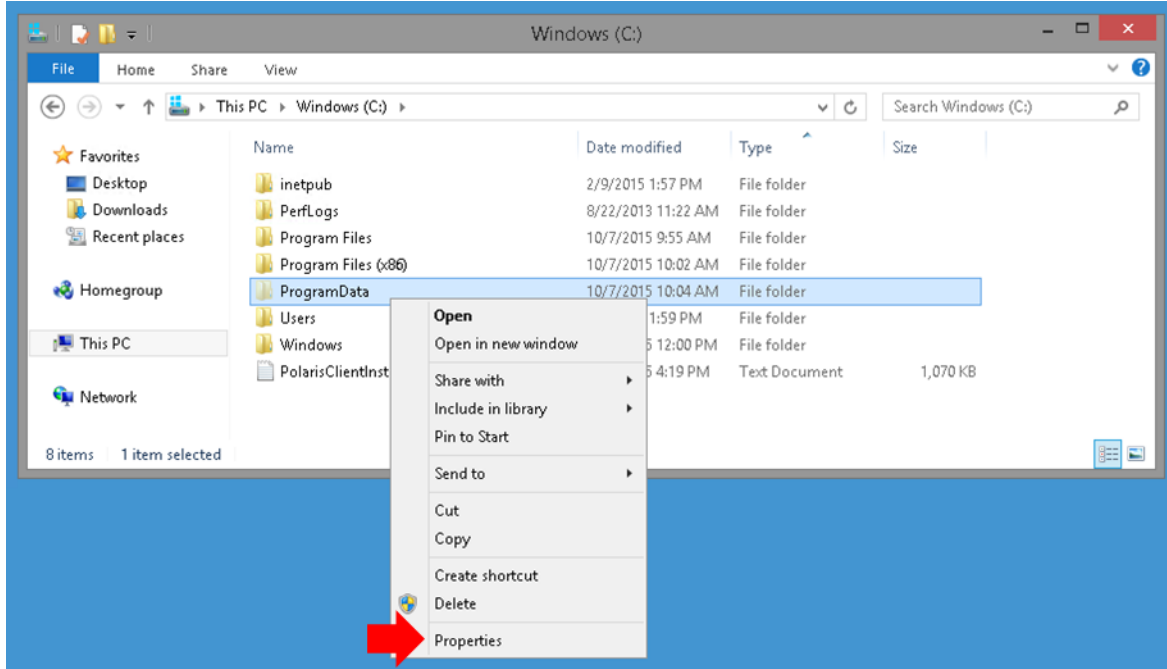
4) Uncheck the "Hidden" box in the properties window and then click the "OK" button:
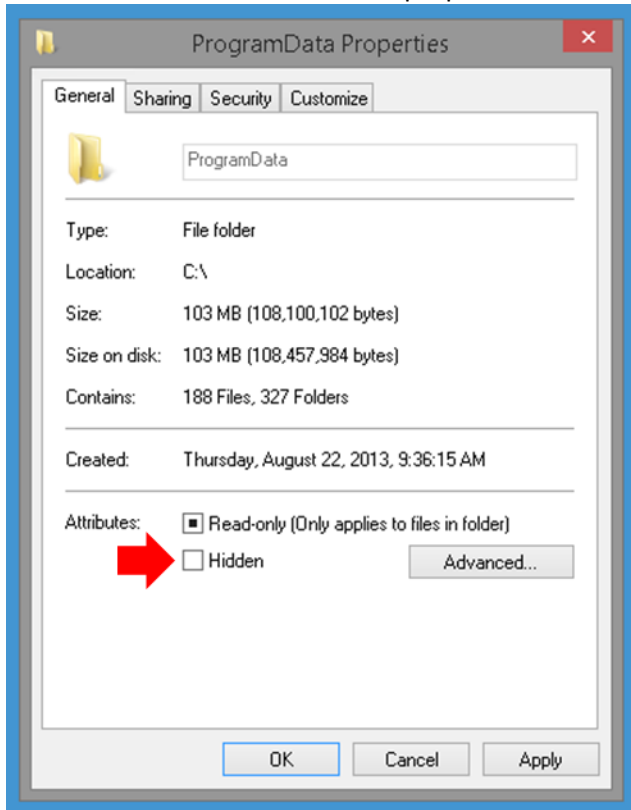
5) After clicking the "OK" button you will be prompted to apply the change just to the ProgramData folder or to all objects within the ProgramData folder. Either option is fine, but all you really need to do is unhide ProgramData.
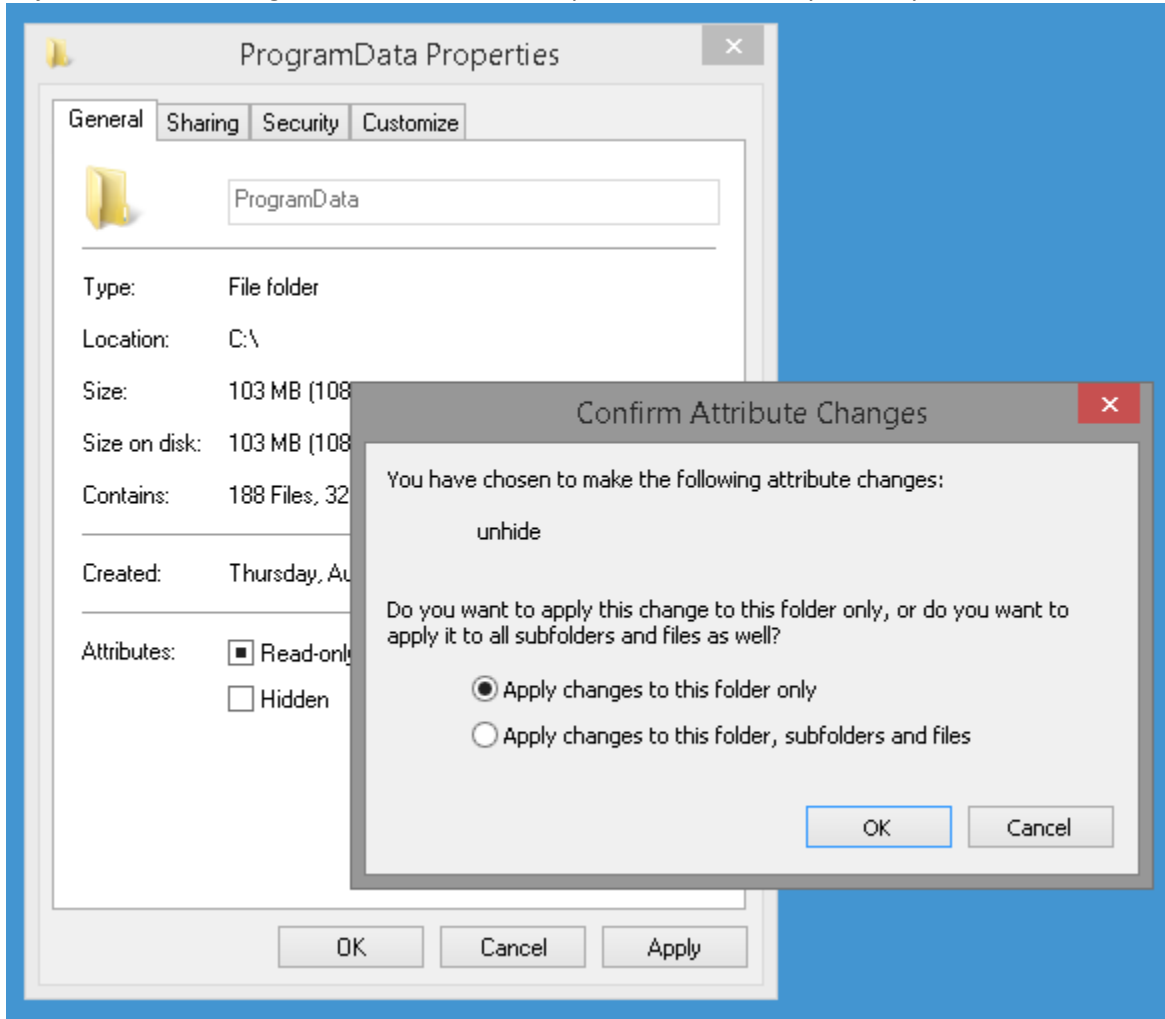
After selecting your option click "OK" to apply the change.

Now your ProgramData folder is viewable!

Common Errors Seen During the Offline Process

Error: Local system data source could not be opened.
Verify that the following file exists on your workstation:
C:\ProgramData\Polaris\<version>\Offline\PolSystem.mdb

Error Message:
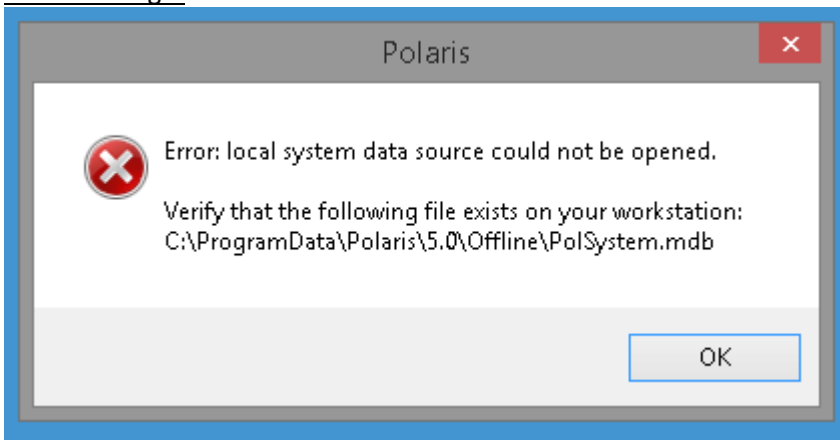
Cause of Error:
You have not downloaded the offline databases to the correct location.

Steps to Resolve this Error:
1) Follow the steps described in the section "Downloading Your Library's Offline Databases"

   IMPORTANT: Pay special attention to which directory you are saving the offline databases.
   It is very important that these files are saved in the proper directory for your version of the offline client.

   Click here to go there now.

Common Errors Seen During the Offline Process

Authentication failure: Polaris workstation not registered

Error Message:

Cause of Error:
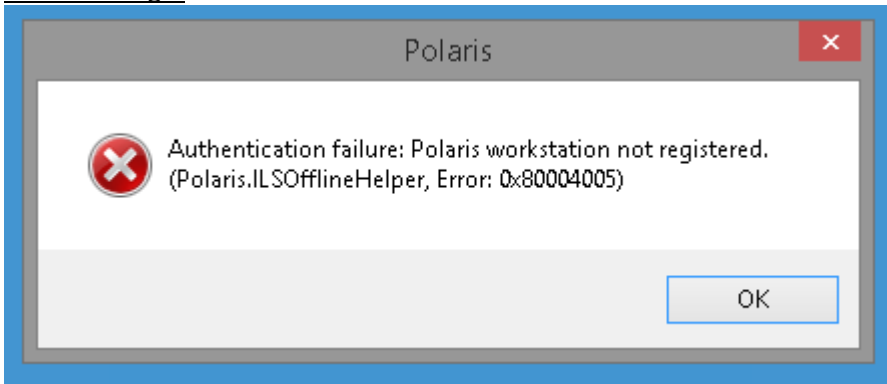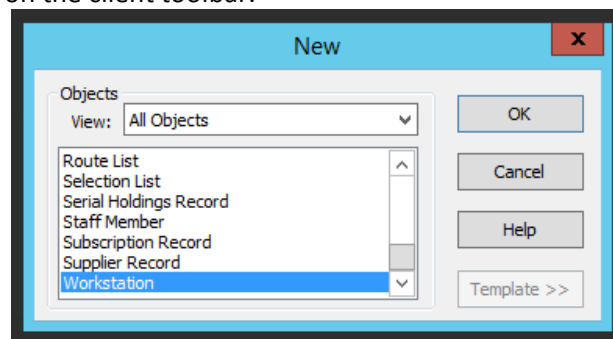The workstation you are using for offline purposes is not registered within your ILS databases.
The offline databases do not contain a matching workstation record.

Steps to Resolve this Error:
1) A library system administrator (within the Polaris ILS) must create a new "Workstation" record for your local workstation.

2) Have a library administrator (within the Polaris ILS) log into your live database client (from your hosted terminal server).

3) Click the "New" button on the client toolbar.

4) Fill in the workform with the information specific to the workstation and click the "Save" button.

5) The new workstation record will be populated into the offline databases the during the next night's creation process. If you need the access sooner, then open a support ticket to request updating for the offline databases.

Common Errors Seen During the Offline Process

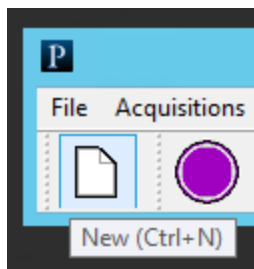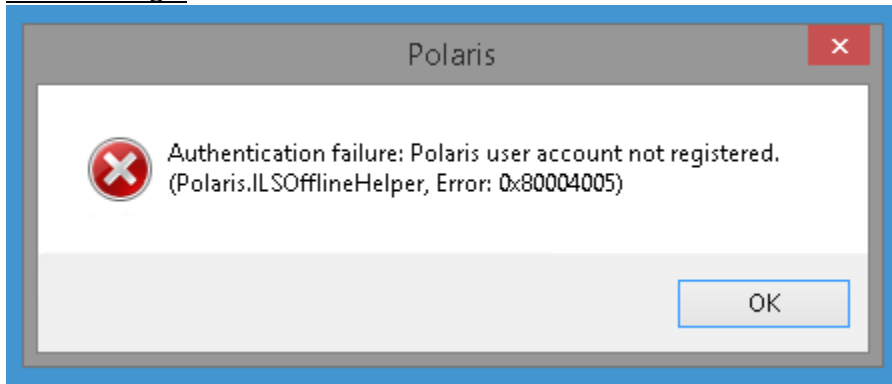## Authentication failure: Polaris user account not registered

Error Message:

Cause of Error:
The username you are using for offline purposes is not registered within your ILS databases.
The offline databases do not contain a matching staff member record.

Steps to Resolve this Error:
1) A library system administrator (within the Polaris ILS) must create a new "Staff Member" record for your user. NOTE: If this is for a new staff member, then you may also need to open a support ticket to have the associated user created within the hosted Active Directory.

2) Have a library administrator (within the Polaris ILS) log into your live database client (from your hosted terminal server).

3) Click the "New" button on the client toolbar and select "Staff Member" from the list of options:
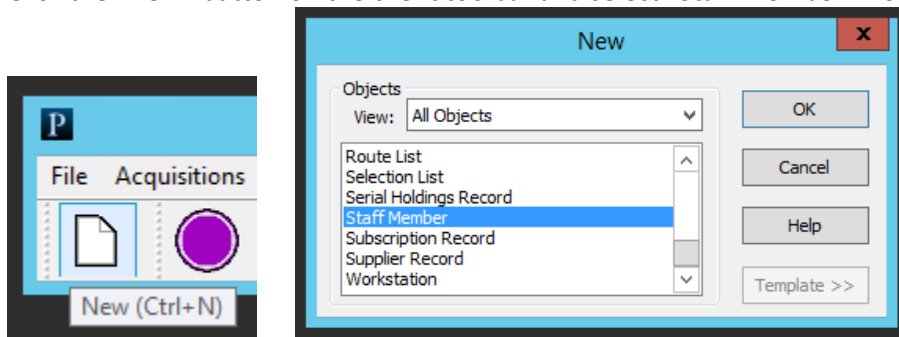
4) Fill in the workform with the information specific to the staff member and click the "Save" button.

5) The new staff member record will be populated into the offline databases the during the next night's creation process. If you need the access sooner, then open a support ticket to request updating for the offline databases.

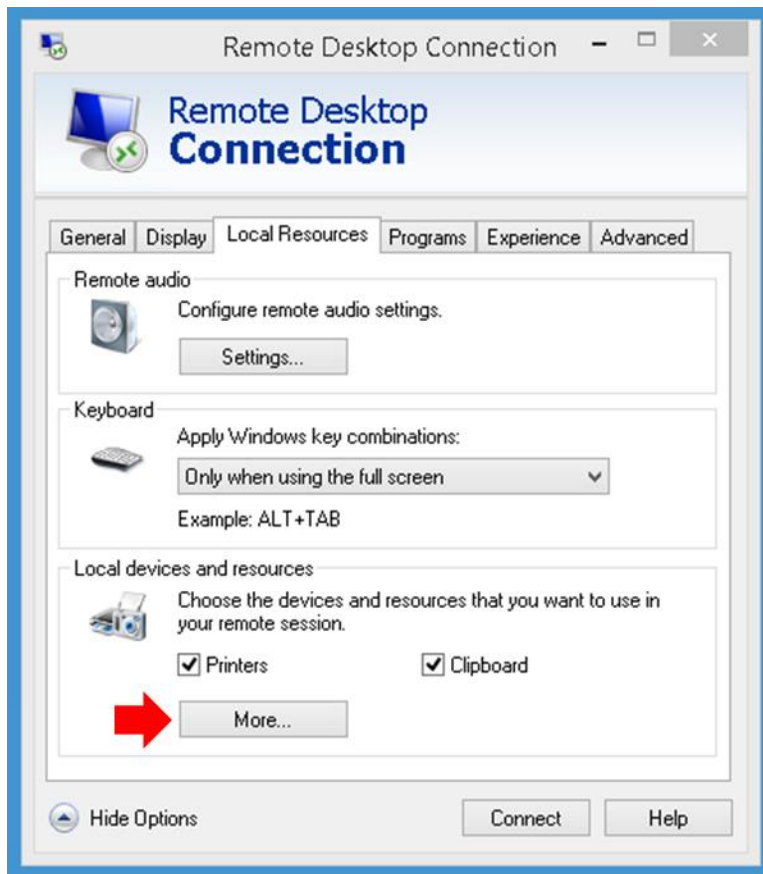# Common Errors Seen During the Offline Process

My local disk drives are not mapping to the terminal server

<u>Cause of Error:</u>
Drive mapping may be disabled on your remote desktop connection client.

<u>Steps to Resolve this Error:</u>
1) Open up your Remote Desktop Connection program so that you can reconfigure the properties.
   NOTE: If you have a shortcut on your desktop, then you may be able to right click on the shortcut and click "Edit" from the drop-down menu.
   HINT: You can open up the Remote Desktop Connection program by running "mstsc" (without the quotes).

2) On the "Local Resources" tab click the "More…" button in the "Local devices and resources" section:

NOTE: This is a good time to make sure your "Printers" and "Clipboard" boxes are also checked (see screenshot).
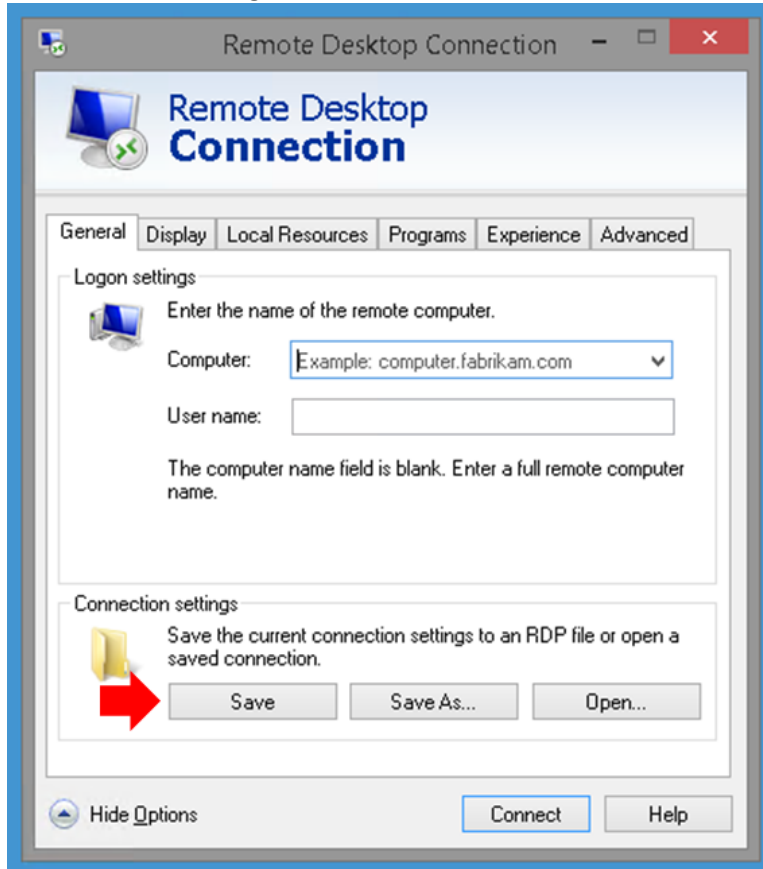
3) Make sure that the "Drives" checkbox is selected:
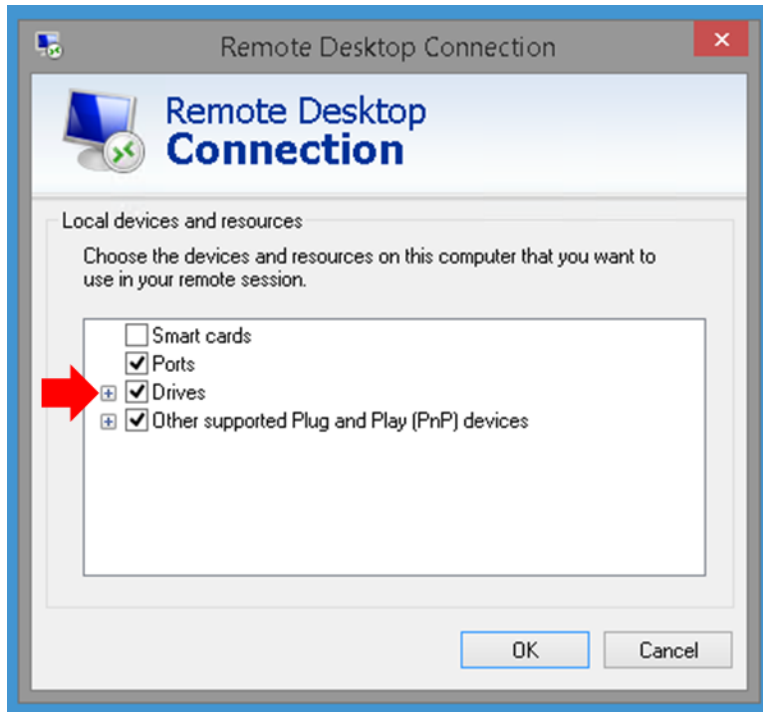
4) Click "OK" and then go back to the "General" tab and click the "Save" button to update your configuration:

HINT: If you would like to make a pre-configured shortcut to automatically connect to your hosted terminal server, then you can choose the "Save As…" button instead and save a shortcut to your desktop (or any other directory that you choose).

5) Try connecting to your hosted terminal server again see if you can access your mapped drives.
   a. If you can see your mapped drives, then you are all set and can stop here.
   b. If you still cannot see your mapped drives, then continue to the next step.